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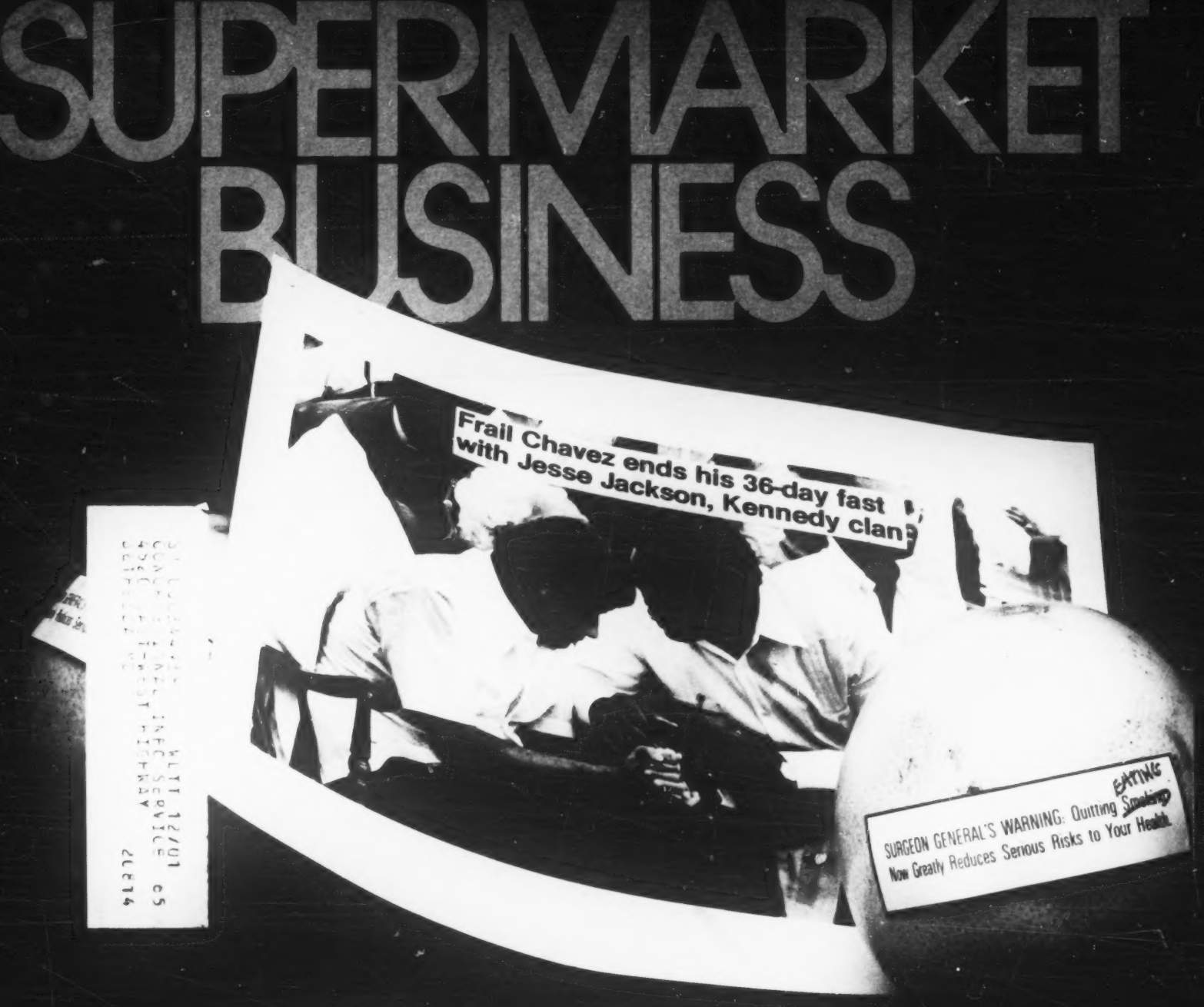
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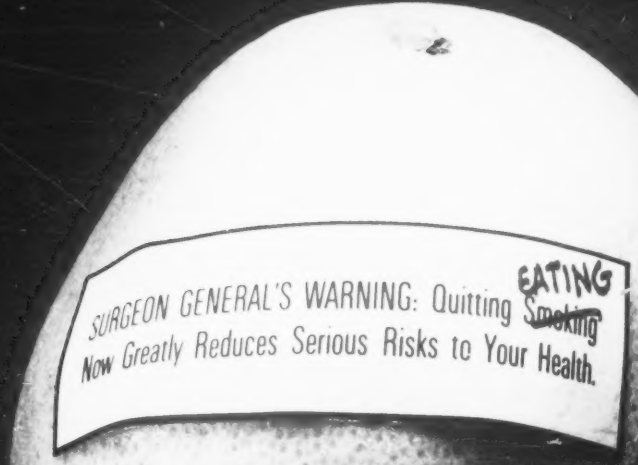

THE POLITICS OF FOOD SAFETY

Is the food we eat really unsafe, or are the advocates merely searching for issues?

With no clear guidelines, supermarkets are on their own.

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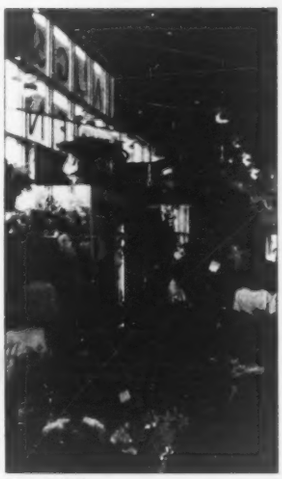

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By Ken Partch,
Editor-in-Chief

Is The Cost Of Food A Dead Issue?

Comparing grocery retailing around the world is an interesting and enlightening endeavor. In many parts of the "free" world, it is the small retailer who still has plenty of political clout. In Japan, a case can be made that progress in weeding out too many unproductive old-fashioned formats is being hindered. Small operators have been known to physically attack larger chain store operators. Of course, in parts of Europe the political clout of small retailers came too late to halt the inevitable, and big chains have enormous share of market.

But in the U.S., the issue is not so much big chains vs. small retailers. Sure, big chains have a lot of advantages in having big capital investment capability. But in many markets, small operators can still do well. Big regional chains are much more profitable that the giant multi-regionals.

The important question is: What of the present and future? In the past, the Robinson-Patman Act served pretty well to protect the small retailer, at least insofar as the big retailers receiving preferred treatment by big manufacturers. Today, that may be part of the problem, but there are other aspects of the retailer/wholesaler/manufacturer relationship that Robinson-Patman does not seem capable of addressing, even if there were a Federal Trade Commission willing to enforce it.

The next question is: If the R-P Act is too vague or contradictory to enforce, why isn't it being rewritten? More important, why isn't there political pressure on the legislators to rewrite it? Even the question: Do we need it, deserves to be asked?

If R-P needs to be rewritten, which I suspect it does, why aren't manufacturers or retailers or wholesalers lobbying to have it done? Is it because business, at all levels, believes that *unenforced* bad legislation is better than any new legislation?

Of course, there are always inequities in any free market system. But in the U.S., an unfair advantage is usually considered an abuse. Especially when that unfair advantage leads to abuse of the general public—the consumer. At present, that abuse is not so apparent. But the potential political exploitation of this issue is clear.

> Have we reached the point that speculation about increased food costs is not very exciting?

In the present political and economic climate the watchdog atmosphere of consumer protection is at a low level, if it exists at all. It is also probably not apparent that many actions in today's supermarket marketplace have or will cost consumers more money. Curiously, no public watchdogs seem much interested in doing the homework that would or could make such a case.

It is doubly curious that more is written these days in the business and trade press than appears in the public press about the inequities that will eventually lead to higher prices for the consumer. Is this because the public or general press doesn't understand the questionable tactics and practices, or because no public bodies have taken the trouble to do the study needed and then make it known?

The front page, right-hand column of the November 1st issue of *The Wall Street Journal* carried a lengthy article about how manufacturers are being charged special fees either to get on the supermarket shelf or to stay on. It was even speculated that eventually these added costs might be passed on to the consumer? Where else? In the 1960s and '70s this would have become an immediate, red-hot consumer issue.

The curious question is: Have we reached the point where the cost of food as a percentage of disposable income is so low that such speculation about increased food costs is not very exciting?

Could it be that price, as a consumer consideration, is not as important as it once was? Perhaps time is more important to consumers, or variety, or convenience? And if that's the case, then perhaps we should be taking a whole new look at supermarket advertising.

And if that is the case, why should manufacturers be dropping so many cents-off coupons, and so many retailers offering "double" coupons?

Personally, I don't think consumers are not interested in price. It may not be the primary interest for many people who don't have much time these days, but I am also aware that many families have multiple wage earners because they need them to survive. The yuppie group and the dink (dual income, no kids) group are both relatively small in terms of demographics.

My guess is that with all the millions of words written about business, and business practices these days, they are not half as interesting to many people as news of celebrities, dogs, cats and circuses. Witness our most recent elections and the levels of political discussions. ■

SAMI UPDATE

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 8/12/88	4 WEEKS ENDING 9/9/88	4 WEEKS ENDING 10/7/88
BABY NEEDS	**+ 0.9%**	**– 0.4%**	**– 2.2%**
Baby Powders	+ 5.3	+ 4.7	– 6.7
Baby Oils, Creams & Lotions	+ 1.9	– 2.7	– 0.2
Infant Clothes	– 12.6	– 10.9	– 15.4
Nursing Supplies	0.2	+ 1.1	+ 0.1
DEODORANTS	**+ 4.3%**	**+ 3.7%**	**+ 0.6%**
Sprays	2.5	+ 6.6	– 0.9
Roll-Ons	+ 3.4	+ 4.6	– 3.4
Stick Deodorants & Pads	+ 7.1	+ 1.8	+ 0.1
Creams	– 6.1	– 8.7	– 8.1
Deodorants & Talcum Powders	+ 3.1	– 3.1	+ 2.8
Feminine Hygiene Deodorants	+ 37.5	+ 58.9	+ 87.5
Foot Deodorants & Athlete's Foot Remedies	+ 8.6	+ 7.7	+ 5.5
Feminine Douches	+ 8.2	+ 2.2	+ 6.9
FIRST AID	**+ 0.6%**	**– 1.2%**	**+ 0.9%**
Antiseptics	+ 4.6	+ 3.9	+ 3.2
First Aid Products	– 1.4	– 3.4	– 0.5
HAIR CARE NEEDS	**+ 6.0%**	**+ 2.6%**	**+ 3.8%**
Shampoos	+ 2.4	+ 0.4	– 0.3
Hair Sprays	+ 13.7	+ 7.2	+ 13.1
Hair Conditioning Rinses	+ 11.8	+ 8.3	+ 7.6
Hair Setting Needs	+ 4.0	– 0.8	– 1.4
Home Permanent Kits	– 6.0	– 11.0	– 20.9
Hair Coloring	0.1	– 2.5	– 4.2
Hair Dressing Needs	– 7.5	– 9.0	– 8.3
ORAL HYGIENE	**– 1.7%**	**– 2.8%**	**– 1.7%**
Toothpastes & Powders	– 5.9	– 6.5	– 6.9
Mouthwashes	+ 7.0	+ 3.2	+ 9.3
Breath Fresheners	+ 2.0	– 0.2	– 0.9
Denture Cleaners	+ 0.3	+ 3.5	– 0.1
Denture Adhesives	+ 0.8	+ 3.1	– 6.4
Toothbrushes	+ 4.9	+ 0.6	+ 8.2
Dental Aids	+ 0.2	+ 3.4	+ 0.5
PROPRIETARY REMEDIES	**+ 2.0%**	**+ 1.3%**	**+ 2.2%**
Antacids	+ 1.8	– 1.8	– 0.0
Internal Analgesics	– 0.4	– 0.3	– 0.3
External Analgesics	– 2.3	+ 2.9	– 1.7
Cold Remedies	+ 8.8	+ 6.5	+ 7.1
Nasal Sprays – Drops Inhalers	+ 0.5	– 7.2	– 6.7
Chest Rubs	– 5.0	– 7.5	– 6.1
Cough Remedies	– 0.3	– 2.1	+ 2.1
Laxatives	+ 6.5	+ 8.0	+ 2.3
Sleeping Aids	+ 1.7	– 0.5	+ 2.4
Tranquilizers	– 7.9	– 2.6	– 6.7
Synthetic Vitamins	+ 0.3	+ 4.4	+ 13.2
Eye Care Products	+ 7.6	+ 8.6	+ 7.1
Appetite Suppressants	+ 15.3	+ 10.4	+ 2.9
SHAVING NEEDS	**– 0.4%**	**+ 3.8%**	**+ 1.2%**
Shaving Creams	– 2.2	+ 3.4	+ 4.8
Pre-Shave Lotions	– 4.6	+ 0.7	– 0.7
After-Shave Lotions	– 2.1	– 5.5	– 10.0
Razor Blades	+ 0.5	+ 5.2	+ 0.9
Razors & Blades	+ 8.5	+ 0.3	+ 5.0
SKIN CARE AIDS	**+ 8.8%**	**+ 2.3%**	**+ 0.9%**
Hand & Body Creams & Lotions	+ 17.2	+ 2.7	+ 3.1
Facial Preparations	+ 10.0	+ 6.1	– 4.8
Lip Care Products	– 5.0	+ 0.3	+ 2.2
Suntan Lotions & Oils	+ 22.8	+ 30.6	+ 68.8
Cosmetic & Medicated Skin Aids	+ 2.2	– 1.3	– 1.7
TOTAL ALL CATEGORIES	**+ 2.3%**	**+ 1.0%**	**+ 1.2%**

HBA Items Show Only A Very Modest Growth Rate

Food store sales in general were lackluster as the hot, dry summer ended with few new products.

BY ALAN B. MILLER JR.

Each year about this time we scan the sales of health and beauty aid (HBA) products during two four-week SAMI reporting periods at once. The ending dates were September 9 and October 7, so we are pretty much painting the sales movement picture during the months of August and September.

The performance of health and beauty aids products tracked by SAMI overall was fairly constant during the two intervals under scrutiny. Unit sales in 52 categories combined rose 1.0% in the September 9 period and 1.2% as of October 7. However, there were a number of changes in category trends compared with a year ago between periods.

In the September period there were 32 categories with four-week gains and 20 with declines. In the October span the increases and decreases among categories evened out at 26.

Although this finding would appear to suggest that HBA products were deep in the doldrums during the month of September, their tonnage performance compared favorably with all other product departments except self-stable foods, which increased 1.3% in poundage or slightly more than the 1.2% unit gain for HBA products. In the most recent reporting period there were losses of 2.1%, 0.5% and 0.8% for nonfood items, frozen foods and refrigerated foods, respectively. Price increases, triggered by the summer drought conditions, helped to account for weakness in several food categories, while a dearth of important new HBA products contributed to the slow growth rate in this sector.

During the September reporting period there were five product groups with plus signs and three with minuses compared with the corresponding year-ago period. In the more recent period the score on a product group measurement basis improved to six and two, with baby needs and oral hygiene the only product groups with negative trends.

In the September period, first aid products were also down slightly from the year-earlier levels.

Between reporting periods, baby needs weakened as three of the four product categories showed losses. The only gain was a minuscule improvement of 0.1% for nursing supplies. Baby powders, which had been enjoying a brief stay in plus territory, fell back 6.7% in the October reporting period. Two of the four categories now show a loss for the 52 weeks: infant clothes (–16.7%) and baby powders (–4.7).

Personal deodorants fall

The personal deodorant product group also experienced a decline in the October period; it had a gain of only 0.6% as compared with a rise of 3.7% during the preceding period. Three of the categories fell behind in the most recent period: spray deodorants (–0.9%), roll-ons (–3.4%) and creams (8.1%). Of these three only roll-on types have recorded a gain for the full year (+ 1.6%).

The national rollout of the Massengill feminine hygiene deodorant helped this product category register a four-week gain amounting to 87.5%. The only other new product this year in the deodorant product group has been Mennen Speed Spray, which is both new and national.

The first aid product group was slightly ahead of last year's pace as a result of 3.2% gain for antiseptics in which double-digit increase rates were achieved by Neosporin, Cortizone 5, Benadryl, Solarcaine, Lanacort and Swan. There was a loss rate for first aid products (bandages, gauze, cotton swabs, etc.) in both reporting periods.

SAMI UPDATE

but the most recent loss rate amounted to only 0.5%.

There was a slight improvement in the gain rate for hair care needs between periods from 2.6% to 4.5%, although there were current losses in five of the seven product categories. The 13.1% improvement in hair spray volume and 7.6% increase for hair conditioning rinses were sufficient to wipe out losses of 0.3% for shampoo, 1.4% for hair setting needs, 20.9% for home permanent kits, 4.2% for hair coloring and 8.3% for hair dressing needs. Three of these categories are now experiencing negative trends for the full 52 weeks — shampoo (-1.5%), home permanent kits (-10.9%) and hair dressing needs (-7.2%).

Few new hair care products

There have been only five important new product launchings in the entire hair care needs product group during the past year. These are Clean & Clear shampoo and hair conditioning rinse, Salon Selectives hair spray and hair setting needs and Bold Hold hair spray. It is unusual to find so little innovative new brand activity in this highly competitive group.

The unit movement trend for oral hygiene products was negative for both periods, although the loss of 1.7% in the October period represented a slight improvement over the 2.8% drop in the September period. The weakness in the toothpaste and powder category can be traced to a decline from the year-ago period in which a number of new line extensions were enjoying consumer acceptance.

In the most recent period the gains were attributed to mouthwash (+9.3%), toothbrushes (+8.2%) and, to a lesser extent, dental aids (dental floss and appliances). The only major new brands in this product group during the past 52 weeks are Aqua-Fresh Tartar Control toothpaste and Prevent Toothbrushes (Johnson & Johnson).

Gains outnumbered losses, eight to six, for October in the proprietary remedies group, where volume as a whole improved 2.2%. There were no severe declines in the high-volume categories. Antacid sales were just a shade below last year and sales of internal analgesics moved downward 0.3%. Strength among synthetic vitamins and natural vitamins, minerals and supplements succeeded in helping the product group remain in the plus column. The 7.1% increase for cold remedies translates to a four-week gain for more than one million units.

Among cough and cold remedies there were losses in the case of nasal sprays-drops-inhalers (-6.7%) and chest rubs (-6.1%), but in the late summer period such reverses don't cause as much of a sales problem as would be the case in the peak season. There have been only two important million-dollar brands in 1988 in this product group: Imodium antacid and

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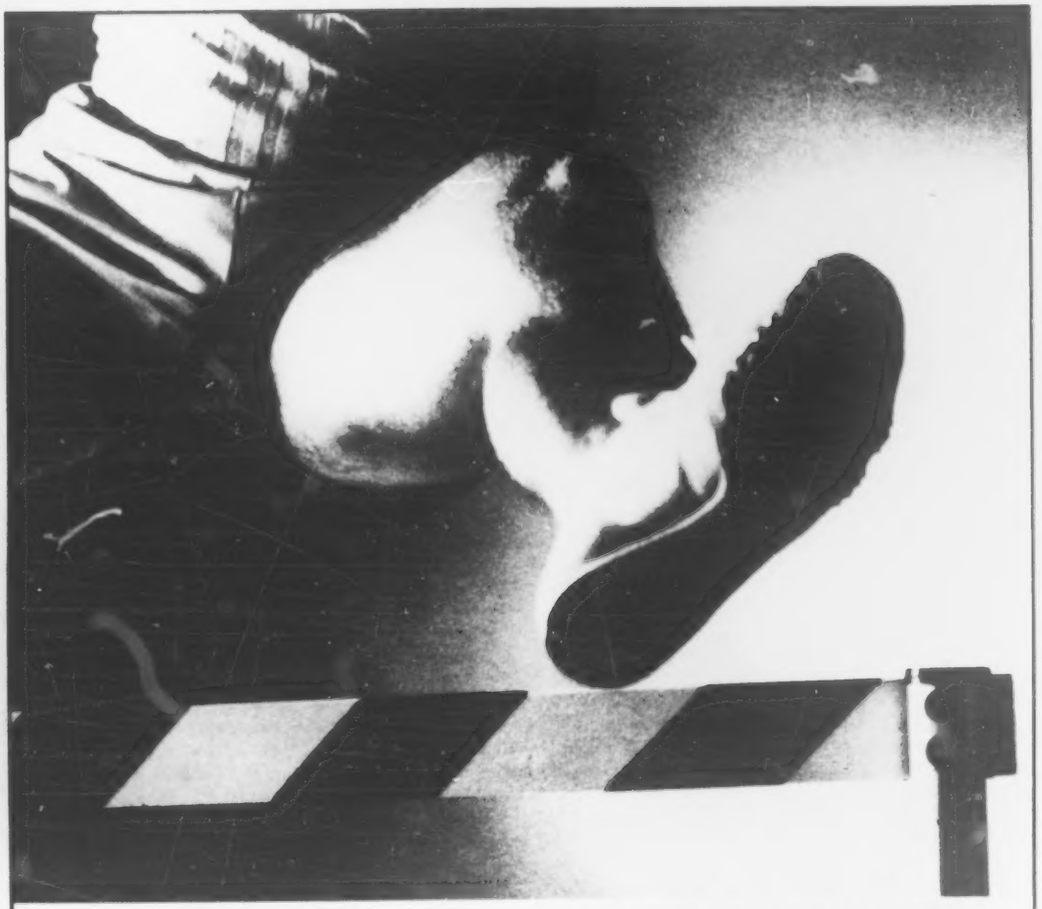

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Number 2 in a series

Three basic hurdles block the track to productive trade show attendance: 1) Wasted time. 2) Incomplete information. 3) Losing track of important information you see and hear. Here's how to overcome them.

1) Within the first two minutes of each visit, use "search talk" to steer conversation your way. Ask probing questions that produce the kind of information you're interested in.

2) Ask your most important questions more than once. Generally, the second answer to the same question is the better one.

3) Take notes. Without notes, research shows that 50% of what you've heard will be forgotten one minute later. You'll find the answers you receive are more specific the moment someone sees you're writing things down.

One, two, three simple points. But so important. And each one will eliminate hurdles when you return home. See you at the Show!

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Jeffrey A. Schaeffer, Publisher

SAMI UPDATE

Continued from page 36

Alleract cold remedy. This, too, is an atypical finding in comparison with other years.

During the October 7 reporting period there were three categories of shaving needs with gains and two declines. The performance of the product group (+1.2%) moved downward from that of the preceding period (+3.8%), primarily because of a reduction in the four-week trend of razor blades from +5.2% to +0.9%. There were gains for shaving creams in both periods, with the most recent increase amounting to +4.8%. There were no new million-dollar brands this year in the entire shaving needs group.

Because of weakness among facial preparations (-4.8%) and cosmetic and medicated skin aids (-1.7%) the October 7 gains for skin care aids amounted to less than 1%. A 3.1% gain for hand & body creams & lotions was sufficient to keep the product group in black ink. There was a four-week gain of 68.8% for suntan lotion-suntan oil, but in the waning summer months the additional volume didn't amount to many new sales dollars. There were just two new and national brands in the skin care aids product group—Vaseline Intensive Care Hand & Nail Lotion and Buf-Puf Cleaners.

I have touched upon the major trends among health and beauty aids at the product category level of measurement. Within these categories there were a number of product classes with high national unit volume gains for the 12-week period ending October 7. In the feminine hygiene deodorant category the new Massengill Towelettes have caused the towelette class to grow more than 1,000% and the volume is nearing $2 million on an annual basis. In the feminine douches/washes category, which grew 5% vs. a year ago, the liquid items soared 132%.

As we have seen, shampoo volume has not been expanding in 1988, but special-purpose shampoos have increased 18.9% and balsam and protein items have grown 11.4%. ■

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